

Collaborative Road Map Design Process

Comprehensive Monitoring Assessment and Research Program CALFED Bay/Delta Program

**July 21, 1998
Sacramento, California**

Background Information

Context

The Comprehensive Monitoring Assessment and Research Program (CMARP) Steering Committee of the CALFED Bay/Delta Program has accepted the concept of undertaking a collaborative design process in July 1998 to produce a road map for CMARP work through January 1999. The Steering Committee has invited key participants in its work effort to collaboratively design a road map showing who will accomplish the work. The Steering Committee has asked the Green Mountain Institute for Environmental Democracy (GMI) to assist participants in undertaking the design process. Based in Montpelier, Vermont, GMI is a nonprofit organization that works with key leaders to design and implement successful collaborative processes at the local, state, watershed, and regional levels that link governmental agencies, citizens, and environmental information to produce identifiable improvements in environmental quality and existing environmental decision making processes.

What is a collaborative process road map?

A collaborative process road map is a tool to develop, record, and agree upon the flow and involvement of multiple participants in a series of events over time (a project or large scale collaborative problems solving). A collaborative process can result in an effective design to provide leaders, teams members and their facilitators with a tool to design a process with detailed and concrete steps. The process can provide a basis for key stakeholders to know in advance how they can participate. A well-crafted road map provides an essential bridge from the current to the desired future state.

A collaborative process road map typically seeks to answer:

- What are the agreed upon results?
- Who needs to be involved?
- What are the participants' roles?
- What are the necessary intermediate activities, products, and results?
- What resources are necessary to complete the tasks?
- What is the timeframe for the overall effort and its various activities?
- How do the specific tasks fit in with the overall effort?

Desired outcomes of the process would be to:

- bring new team members on board quickly

- enroll key stakeholders
- show key decision makers and/or resource providers the entire flow of a project, from start to finish
- set critical meetings on calendar
- reduce political issues (e.g., turf protection)

How will participants be involved in this process?

All the participants in the collaborative road map design process are key participants in making the CMARP agenda happen. Participants will be asked to identify what they will produce and when, who they will work with, which stakeholders should be involved, and what resources are needed to get the job done. By contributing this information and by knowing what each group is going to do, participants can experience and own the plan gaining a better chance of making it live and breathe. The concept that “planning is everything, plans are nothing” applies to this process. The idea is to participate in a dynamic whole that is greater than the sum of its parts.

GMI and the CMARP Steering Committee request that the participants clear their calendars completely for July 21st and plan on contributing to the process for the full day.

Homework

GMI and the CMARP Steering Committee ask that participants read *A Proposal for the Development of a Comprehensive Monitoring Assessment and Research Program*, Final Report, April 24, 1998 to understand the vision of CMARP at this point in time. The document is available as three downloadable files on the Internet at <http://iep.water.ca.gov/cmarp/> Click on CMARP Stage I Final Report to access the files.

When you read the document, focus your attention on Task 3—Monitoring Program Design, and Task 4—Design a CALFED Focused Research Program, and think about the key activities, products, agreements and milestones that will need to be achieved to make the CMARP workplan successful. In your role as members of teams that will be building these products, think about the stakeholders you will need to involve, the key resources (human and financial) necessary to the effort, and the possible linkages between/among the teams that will enhance and expedite the process.

CMARP Timeframe

A major constraint on the collaborative process design and the work effort is the relatively short CMARP timeframe for accomplishing this phase of its work by January 1999. Draft materials from the CMARP Teams are needed by the CMARP Steering Committee in the last half of October 1998 with initial revisions taking place in the first two weeks of November. A review of the CMARP work is anticipated to start in mid-November and conclude in the first half of December. At that point in time, the Steering Committee and other key players would incorporate comments into a final product by January 15th. The audience for this work is CALFED, but also the Congress of the United States.

Enjoying Your Work

Participants are encouraged to prepare for the process by being well rested, thoughtful, and practical. The daylong collaborative process offers an intense, hands-on opportunity to build a road map for your work while being creative and having fun. We look forward to a productive event that will enable you to have your visions become reality.

A draft agenda for the day follows for your information.